# TICKLERS MODULE

## 1. TECHNICAL REQUIREMENTS

### 1.1   Introduction

This document is the technical response to the SWSS Foster Care User Requirements for the Tickler Module. It will describe how the development team will implement the changes and additions to SWSS Childrens to effect the requirements.

This document is to be used as a tool by the development team when coding the solution or maintaining it in the future.  Thus this document is likely to be updated during the lifecycle of the SWSS project.  Versions of this document will be maintained in PVCS, and the reader should be aware that multiple printed versions might exist.

### 1.2   Module Description

The life of Service case from getting registered to close has many actions to be taken in different SWSS sections. The Services worker needs to be reminded of any activity due at a particular date. Which may be done by marking the date of the activity on the calendar manually. So, considering the workload on each worker and the number of workers under a supervisor, this process is automated. The Ticklers module basically displays the reminders/ticklers for a service worker on a calendar for the cases he/she is handling. The ticklers tell the worker of the action to be taken like opening a case or Attending a court hearing etc. , the date the action is due.
The tickler module also allows:
- Supervisors to see ticklers for their subordinate workers.
- Workers to see their alternate workers ticklers
- Supervisors to Transfer ticklers from one worker to another
- Workers to add some Personal Ticklers which may be related to a case.

### 1.3   Requirements

### 1.3.1        Process Description

Describe the business process that this module implements.  This can be copied directly from the User Requirements, and should probably mention the name of the User Requirement as well.

## 1  MODULE NARRATIVE

Ticklers module is made up of five independent screens as:

**Ticklers Due Screen:** This screen displays a calendar of ticklers where user can scroll back or forth by month to see the ticklers due in a month. Initially this display the current month with the ticklers for a day are marked with a pushpin and post-it icon. Worker can select a day having ticklers and then each tickler due on the day is displayed with details in the grid on screen. If the worker double-click on a day having ticklers; it opens the Tickler Due screen to show more details about the ticklers due on the selected date.

**Ticklers Display Screen:** This screen is to specify the criteria for the ticklers to be shown on the Tickler Details screen. Worker or Supervisor can specify the ticklers to be shown by the attributes like:

Log Number and/or Case Numbers, for a worker to whom the logged in worker is Supervisor, alternate worker or ticklers where the worker is the Primary or Secondary worker or Ticklers due in a range of dates. Worker have to select the criteria and select the View Details menu or button which opens the Tickler details screen displaying the ticklers. There is a checkbox to select All the ticklers on this screen

**Ticklers Details Screen:** This screen displays all the details of the ticklers selected in Tickler Display or Tickler Due screens in grid.  Worker can sort the ticklers by selecting one or more columns and the order as ascending or descending.

**Add Personal Tickler Screen:** This screen is to allow workers or supervisors to add and maintain personal or Non-standard ticklers in the SWSS. The workers can also search for the added ticklers by the log/case number or due date.

**Transfer Tickler Screen:** This screen is only enabled for Supervisors. This allows supervisors to transfer the ticklers of one worker to another for either one long number or all log numbers handled by the source worker.

**2    NAVIGATION FLOW**

2.1    Screen Interaction

When worker logs in the SWSS system the first screen displayed is the Tickler Due screen. This screen have a button 'Main Menu' to skip the tickler module and return to Main Menu. The Tickler Due screen displays all the ticklers due for the worker in the current month. Worker can select or double-click the date having ticklers and see the details of all ticklers due on that date in the grid or Tickler detail screen.
From the Tickler Due Screen worker can go to the Tickler Display screen, Add personal tickler screen, Tickler detail screen and if he/she is a supervisor then to the Transfer Tickler screen too.
From the Tickler Display screen worker can go to the Tickler Details screen after selecting the criteria like Log Number, Date range etc. or selecting the check box 'View All Ticklers' to see the details of  the Ticklers.
In the Add personal Tickler screen worker can perform following operations:
**Search:** Select values in Load number pick list, Log Number or Case number pick list, enter a valid the Due date, then select the Search button. All the ticklers for the selected load and Log number and due by the due date entered are displayed in the grid.
**Add:** Select values in Load number pick list, Log Number or Case number pick list, enter a valid the Due date,
Enter a message for the tickler in the message box. Select the check box Auto delete if  the tickler needs to be deleted automatically once overdue. Select the Add button. A tickler is added in the SWSS and displayed in the grid.
**Update:** Search for the tickler to be updated. When the tickler to be updated is displayed in the grid. Double click it, which reads all the data like Load Number, Log number, message and due date for the tickler on to the screen edits of Load number pick list, Log number pick list, message edit box and due date edit box. Change the message or any other data for the tickler and select the Update button to update the tickler in SWSS.
**Delete:** Search for the tickler to be deleted. When the tickler to be deleted is displayed in the grid. Select the delete button to delete the tickler.

### 1.3.2          Functional Requirements
1) This needs the information of the user who is logged in currently, to be in SWSS_INI.ini.
2) This module assumes that all standard ticklers for a case are maintained i.e. created, updated and deleted by the corresponding section.
3) This module also assumes that when a user selects a tickler in the Tickler due or details screen to take action and the screen directs the user to the corresponding section then the section needs to have a mechanism to let the user go back to tickler.

### 1.3.3          Business Events
The following are business events that occur which will initiate use of the features in SWSS Children to use Tickler module.
1) User registers, activates, updates  a case.
2) User changes any information in a case in any section, which is related to a standard tickler.
3) A new user/supervisor is assigned to a case.

### 1.3.4          List of Program Units
This would be stuff like common VB code called, the number of VB .BAS modules and form modules in the current application.  Also list the Stored Procedures called.  Show a "Structure Diagram" of which VB procedure calls a stored procedure or another VB procedure.  Also show which stored procedures call other stored procedures.

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| Form_Load | Combolists.Get_LogCaseLoadNos | Fill_LogNo_CaseNo | Get all the Log number, case number and load number combinations for the worker id supplied and for all workers to whom this worker is either alternate, supervisor worker and fills in the Log number and case number lists |
| | Combolists.get_wrkr_lds and Combolists.get_other_wrkr_lds | GetAllWorkLoads | Get worker loads for the supplied logged in worker's ID. Get worker loads for the workers and workers for whom logged in worker is alternate worker or supervisor. |
| CboCaseNo_LostFocus | | MatchLogNoCaseNo | Get the matching Log number for the Case number selected by the user in the Case number list |
| CboLogNo_LostFocus | | MatchLogNoCaseNo | Get the matching Case number for the Log number selected by the user in the Log number list |
| CboWorkerLoads_LostFocus | | MakeInSync | Get the log numbers and corresponding case numbers for selected Load number by the user |
| CmdAdd_Click | General.Is_Valid_Load_Info | ValidateData | Validate the data entered for the new tickler to be added |
| | Tick_Actions.put_wrkr_per_tick | BputWorkerPersonalTickler | Inserts a new record in worker_personal_tickler table with the supplied information |
| | General.Get_Load_Info | GetLoadInfo | Get the load number for the worker Id Supplied |
| | Tick_Queries.Get_Per_Tick | GetTicklerDetails | Get Personal ticklers for a supplied Load, Log and case combination which are having due date less than the due date supplied |
| CmdDelete_Click | Tick_Actions.del_wrkr_per_tick | BdeleteWorkerPersonalTickler | Deletes a record for the key information supplied |
| CmdSearch_Click | Tick_Queries.Get_Per_Tick | GetTicklerDetails | Get Personal ticklers for a supplied Load, Log and case combination, which are having due date less than the due date selected |
| CmdUpdate_Click | General.Get_WrkrID | GetWorkerId | Get the worker ID for the load number selected |
| | Tick_Actions.upd_wrkr_per_tick | BupdateWorkerPersonalTickler | Updates a record in the worker_personal_tickler table for the key information supplied |

Tickler Details Screen:

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| Form_Load | Tick_Queries.Get_Tick_Det | GetTicklerDetails | Get all ticklers for a given worker Id |
| | Tick_Queries.Get_Tick_Det1 | GetTicklerDetails | Get all ticklers for a given worker id and due within the given date range and given type of worker as: alternate, secondary, supervisor and/or |

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| | | | primary. |
| | | MatchCriteria | Match additional criteria specified by the user for the ticklers and add it into the the ticklers grid |
| GrdTickDetails_DblClick | | BgoToScreen | Go to the screen related to the tickler selected by the user |

Tickler Display screen:

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| CboCaseNo_LostFocus | | MatchLogNoCaseNo | Get the matching Log number for the Case number selected by the user in the Case number list |
| CboLogNo_LostFocus | | MatchLogNoCaseNo | Get the matching Case number for the Log number selected by the user in the Log number list |
| CboWorker_LostFocus | | MakeInSync | Get the log numbers and corresponding case numbers for selected Load number by the user |
| CmdContinue_Click | | FrmTickDetails.Show | Show the tickler details screen |
| Form_Load | Combolists.Get_LogCaseLoadNos | Fill_LogNo_CaseNo | Get all the Log number, case number and load number combinations for the worker id supplied and for all workers to whom this worker is either alternate, supervisor worker and fills in the Log number and case number lists |
| | Combolists.get_tick_types | FillTicklerTypes | Get tickler ids for all standard tickler types |
| | Combolists.get_other_wrkr_lds | GetAllOtherWorkLoads | Get worker loads for the workers supervisor. |

Ticklers Due Screen:

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| Form_Load | | SetDeviceIndependentWindow , Call ExtractINI_Info Call makeconnection | Set the screen maximized, gets the info from the INI file and make a connection to database |
| | General.Is_Supervisor | bUserSupervisor | Returns true if the supplied worker ID is a Supervisor |
| Form_Activate | | ShowTicklersForMonth | |
| | Tick_Queries.Get_Tick | GetTicklers | Get all the ticklers for a month and the worker ID supplied |
| | | ShowTicklersForSelectedDay | |

Tickler Transfer Screen:

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| Form_Load | | SetDeviceIndependentWindow , Call ExtractINI_Info Call makeconnection | Set the screen maximized, gets the info from the INI file and make a connection to database |
| | Combolists.get_wrkr_lds | GetWorkLoads | Get worker loads for the |

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| | And Combolists.get_other_wrkr_lds | | supplied logged in worker's ID And Get worker loads for the workers and workers for whom logged in worker is alternate worker or supervisor |
| Form_Load | Combolists.Get_LogCaseLoadNos | Fill_LogNo_CaseNo | Get all the Log number, case number and load number combinations for the worker id supplied and for all workers to whom this worker is either alternate, supervisor worker and fills in the Log number and case number lists |
| CboCaseNo_LostFocus | | MatchLogNoCaseNo | Get the matching Log number for the Case number selected by the user in the Case number list |
| CboLogNo_LostFocus | | MatchLogNoCaseNo | Get the matching Case number for the Log number selected by the user in the Log number list |
| CboFromWorkerLoad_LostFocus | | MakeInSync | Get the log numbers and corresponding case numbers for selected Load number by the user |
| CboToWorker_LostFocus | | MakeInSync | Get the log numbers and corresponding case numbers for selected Load number by the user |
| CmdTransfer_Click | General.Is_Valid_Load_Info | ValidateData | Validates if Log and case number input are Valid for the Load number input |
| | Tick_Actions.Transfer_Tick | TransferTickler | Transfers the ticklers from one Load number to another |

Common Functions in swss.bas:

| VB Subroutine | Procedure Call | VB Subroutine Call | Function |
|---|---|---|---|
| BputWorkerStdTickler | Tick_Actions.put_wrkr_std_tick | | Inserts a record in the worker_std_tickler table for the information supplied |
| BupdateWorkerStdTickler | Tick_Actions.upd_wrkr_std_tick | | Updates a record in the worker_std_tickler table for the key information supplied |
| BdeleteWorkerStdTickler | Tick_Actions.del_wrkr_std_tick | | Deletes a record in the worker_std_tickler table for the key information supplied |

### 1.3.5 Report (output) Images

Print out versions of each output report generated by the module.  For each image, explain its usage.

### 1.3.6 Data Elements

For every element on a screen output report:

- Map each data element displayed, printed, or entered to the database table and field, such as the exan
  done by SDM that Paula mentioned in the team meeting
  (p:\users\share\servwork\SWSS\templates\ReqTemplates\DataDefinitions).xls

- Make a specific reference to the SWSS Schema data dictionary, which ought to be available any
  day now.

- List and discuss any specific validation routines, constraints, or dependent data validations (like
  legal status and living arrangement) that are not in the data dictionary.  You can check (and copy
  from) the User Requirements Data Element Description for these type of validations.

- Specify which elements can only be changed in "Corrections" mode.

- Explain the instancing of this data element in laymen's terms.  This is implied in the table name,
  usually, such as the "Case_Person" table refers to an instance of a (group) person record in a
  particular case, and the "Group_Person" table refers to an instance of a person in a particular
  sibling group.  Go ahead and say it like that, as it applies.  This includes "historical" data, such as
  Medicaid_History, which is an instance of Medicaid data over time.

### 1.3.7        Integration with Existing System

How does this module integrate with SWSS.  Is it a selection from the main menu?  Are there specific things
needed in the SWSS_INI.ini?  Are there short cut keys or menu selections?  Can it be called directly from
another module, during which time the calling module shows a blank screen or mess with the task bar, and
does it need to update something for that calling module?

Ticklers module is called initially after login. The user can then go to Main menu from this module. This
module needs the Logged worker's ID in the SWSS_INI.ini file. This module can also be called from the
utility's sub menu.

### 1.3.8        Module Dependencies

If this module depends on other modules, or if other modules depend on this module, to an extent beyond
what has been described in the "Integration with Existing System" section above, such as Medicaid requiring
both Placement and Funding data, list and explain those dependencies here.

This module dependent on the other modules in a way that, it displays standard ticklers maintained (added,
updated and deleted) by other modules.

### 1.3.9        Database Subject Area

- Show the tables with fields read, created, or modified here.  (CRUD matrix, if you want to be fancy.)
- List the STORED PROCEDURES with detailed descriptions of how that stored procedure works (we're
  serious.  We really need it!)
- Use the Interface specifications that were generated (by Ed?) for the stored procedure calls that the VB
  module makes.

### 1.3.10       Data Warehouse

If known, explain which items are added to the data warehouse and under what conditions they are written.
Hopefully we can reference a document or set of documents supported by the data warehouse.

## 1.3.11        Technical Issues

Discuss any tricky things that happen in the module that someone who maintains the application may not recognize at first glance.  Sibling group sharing, legal status switches, or reusing person IDs.


## 1.3.12        Test Plans

Include the test plan developed for this module, and references to any scenarios that apply to it.

### Test Plan - Ticklers Add Screen

Case Accessibility

- This screen is accessible to any Worker. The worker can add, edit or delete the Personal Ticklers for his/her load or can add and modify the ticklers for the workers for whom he is a supervisor or alternative worker.

Case Functionality

- Verify Search for different search criteria i.e. Load Number, Log Number etc. selected.

- Add a new Tickler for a Load Number in the Load Number list with a Log Number and/or Case Number and Message.

- Verify the newly added tickler by Searching on different fields of it.

- Update the added tickler at different fields like Log Number, Message etc. Verify again searching for the updated Tickler.

- Verify the deletion of the ticklers.

- Verify all menu items- File, Tickler etc. and their submenu items are properly transferring control to appropriate screens.

### Test Plan - Ticklers Display and Details Screen

Case Accessibility

- These screens are accessible to any Worker to search for the Ticklers

Case Functionality

- Verify different criteria for Tickler Display on the Display Screen for: Date Range, Log Numbers etc. and click Continue button to open the Ticklers Detail screen.

- Verify that when the Display all ticklers check box is checked then Log Number list, Due date range and Case Number lists are disabled and Clicked on Continue shall open Details screen with all ticklers displayed.

- Verify all menu items- File, Tickler etc. and their submenu items are properly transferring control to appropriate screens.

Test Plan - Ticklers Due Screen

Case Accessibility

- Any worker can access this screen. The ticklers due shown to a worker are his own ticklers, ticklers due for the workers to whom he is either Supervisor or Alternate worker.

Case Functionality

- Verify that the screen displays  all available Due Ticklers for the logged in  Worker  i.e. All Case related Standard Ticklers and  Personal created Ticklers

- Verify that the ticklers are displayed according to the color Legends.

- Verify that selecting a Day where the Tickler present on the Calendar, displays the Ticklers Due on that day in the grid.

- Verify that double clicking the Day with the ticklers, opens the Ticklers Detail screen with all the Ticklers due on that day.

- Verify that double clicking on a Tickler displayed in the grid, opens the screen corresponding to the selected tickler.

- Click on the Cancel shall return to the Main-Menu or the Utility Menu depending upon from where the Screen is opened.

- Click on the Continue shall open the Ticklers Detail Screen.

- Verify all menu items- File, Tickler etc. and their submenu items are properly transferring control to appropriate screens.


Test Plan - Ticklers Transfer Screen

Case Accessibility

- This screen is accessible to any Worker. The worker can Transfer Ticklers for the load associated with him/her to some other worker's load.

Case Functionality

- Verify that
    - 'From Present Worker Load' list displays the Worker load for the current logged in worker and the loads for the workers to whom the logged in worker is  supervisor or the alternate worker.
    - 'To New Worker Load' list has the all other worker loads excluding the loads in the 'From Present Worker Load' list.

- Verify the transfer tickler process for the Ticklers  for  a  particular Log Number/ Case Number

- Verify the transfer tickler process for the transfer of all the Ticklers i.e. by selecting 'ALL' in the Log Number list.

- Verify all menu items- File, Tickler etc. and their submenu items are properly transferring control to appropriate screens.